Reaching a growing market where it lives

By Renee Blakkan

Outdoor advertising is "the only thing that makes sense aside from tv" in advertising to Hispanics, says Alvaro Montenegro, director/Spanish advertising, Foote, Cone & Belding, Los Angeles. This is because "newspaper and magazine readership is low [among Hispanics] and you need to get brand awareness with visuals." About 40% of FCB's Los Angeles accounts are in Spanish, Mr. Montenegro says.

"A spiral of enthusiasm" can develop when Hispanics see products advertised to them with care.

There is wide agreement among advertising agencies that outdoor advertising is an effective way to reach Hispanics, although they stress that a number of pitfalls must be avoided.

"It makes a lot of sense to advertise to Hispanics with outdoor boards because you can place the boards where they live and have little wasted circulation," says Jeffrey Johnson, manager/marketing service, Gannett Outdoor Group, Phoenix.

Gannett is the largest outdoor advertising company in the world and the second largest in the U. S. (after Foster & Kleiser, which is a division of Metromedia).

Renee Blakkan is a Chicago-based free lance writer who contributes frequently to Magazine and who speaks Spanish fluently.

The junior boards in particular, many of which are eight-sheets (5 ft. by 11 ft.) and smaller, can be "more centrally located in commercial and industrial areas and next to neighborhoods and can have almost a point-of-purchase capability," says Robert Smith, Gateway Outdoor Advertising's Chicago general manager.

Thomas Whelan, Gateway's Pittsburgh-based president, adds: "We can have a panel on or next to a building where a product is sold. A person going to make a purchase is exposed to it, and it has real strength that way. It's the last suggestion before they go into the store."

All the outdoor board companies surveyed for this article said their Hispanic showings are growing rapidly, and some said they're even turning down business. Roughly a third of the 25,000 boards measured nationwide by the Out-of-Home Measuring Bureau (OMB), New Canaan, Conn., are dedicated to Hispanic advertising, says OMB head Julian Sloan. The OMB measures mainly eight-sheets for both amount of passing traffic and effectiveness of showing. The Traffic Audit Bureau, New York, which measures the larger boards (usually on highways and called 30-sheets, measuring 12 ft. by 25 ft.), couldn't estimate the number of its Hispanic boards.

Gateway's Mr. Whelan says more than half his Los Angeles inventory is Hispanic, and in Chicago, 25% of his boards are in Spanish.

Another indicator of Gateway's growth in Hispanic boards is that since 1980 this area has increased 100% in Chicago alone, says Mr. Smith.

Hispanic advertising "is one of the fastest-growing segments of our operation," Mr. Smith adds. "Eight-sheets had emphasized black advertising in the last few years, but now there is a growth in the Spanish-speaking area."

At New York-based Villepique Co., another eight-sheet company, sales manager Stan Langer says his advertising to Hispanics has increased about 60% to 75% in the last four or five years.

At Foster & Kleiser in Houston, Gary Kelley, manager/eight-sheet division, says, "Our Spanish business is fantastic. We sell out in early January for the year." He says most Hispanics in Houston live in "two well defined areas," Northeast and Near North, and advertisers can reach 75% of Spanish-speaking people in the city with showings in these two areas. "I turn down more business every year," he says, "because no more boards can be built due to local ordinances."

A brief look at demographics shows why advertising to Hispanics is growing so rapidly. Hispanics in the U.S. have increased rapidly in the past decade, and experts predict that by the year 2020 they will surpass blacks as the largest minority in the country—46.6 million Hispanics and 44.4 million blacks—according to research by Gannett titled, "Gannett Outdoor Delivers the Hispanic Force."

There's a common perception that outdoor boards targeted to Hispanics center mainly on beer, liquor and cigarets. However, a wide range of other products also is advertised through this medium.

With about 75% of U.S. Hispanics concentrated principally in five states—California, Texas, New York, Florida and Illinois—a relatively few showings can reach large numbers of the market, says OMB's Mr. Sloan.

Moreover, U.S. Census figures show 88% of Hispanics concentrated in metro areas, compared with 81% of blacks and 75% of the total population. Boards in urban Spanish areas will thus not only be seen by those counted in the census, but also by the "missing million" undocumented aliens believed to be in the country and uncounted in the census.

Today, says Gannett's research, Hispanics' total income is about $55 billion, but by the end of this decade it should increase to $200 billion. A 1981 Yankelovich, Skelly & White study showed about 30% of Hispanics earning $20,000 or more. They're younger than the total population (54% are under age 35), and their households are larger (about 3.7 persons compared with 2.8 for all U.S. households). Younger, larger families of course buy more.

And their brand loyalty has been documented as higher than that of Anglos. As the Yankelovich study noted: "The U.S. Hispanic population is more likely than Anglos to value name or advertised brands [and] be brand loyal, yet at the same time [they] seem receptive to new products."

Outdoor boards used to reach Hispanics are most often eight-sheets or smaller. Zoning ordinances generally prohibit the larger boards within cities and in the neighborhoods where Hispanics live. The 30-sheets thus are generally found on the high-

Media

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population.

The Hispanic market defies the kind of generalization one can get away with in defining Anglo society after years of media-molding. The U.S. Census identifies Hispanics as young, having large families, living in urban clusters, and being increasingly mobile as they fan out from Hispanic enclaves of California where 4.5 million Hispanics live, Texas (3 million) and New York City (some 2 million). They are largely Mexican, Cuban and Puerto Rican, although Central Americans, particularly Salvadorans, are flooding into California.

The census does not say that among subgroups Hispanic may mean white, black, Indian or any combination; it may mean Spanish as a second language; it may mean Catholic, although not necessarily the devout churchgoer found among European ethnics, and it may mean increasingly Protestant. Nor does it show that there may be as many as 10 million undocumented aliens, and not all from Mexico and Central America.

Idiomatic language separates them as do varying education and socio-economic backgrounds. Those motivated to immigrate permanently for economic reasons are moved differently than those fleeing political persecution who ultimately seek to return to their homeland. When they came to the U.S. and at what age also has a bearing on their Americanization and hence their market potential to the Spanish-language press.

Given these characteristics, Spanish-language media growth will primarily be affected by where Hispanics draw the line between assimilation and cultural ethnicity, and to a lesser

Hispanic market advertising expenditures by media in 1983

Media	Expenditures
National tv (SIN, Spanish International Network)	$40.5 million
National radio	30.5 million
Local tv (SIN)	40.5 million
Local radio	50.0 million
Independent tv	11.7 million
Print	23.0 million
Outdoor	6.0 million
Promotion	20.0 million
Transit	2.2 million
Total Hispanic market advertising expenditures	$224.4 million*

Source: *Hispanic Business* magazine, Santa Barbara, Cal. Reprinted by permission.
*Total expenditures include production, talent and administrative costs.

ways, where the traffic isn't heavily Spanish.

City ordinances are more relaxed when it comes to the smaller boards, and these are what one sees next to the supermarkets, smaller stores, banks, factories and in empty lots.

"Eight-sheets make a lot of sense" for Hispanics because "they're in the inner city," says Gannett's Mr. Johnson. The smaller boards are suitable for "stop-and-go traffic."

Mr. Langer of Villepique says less than 15% of Hispanics own cars. "They're constantly on the street, so there's no wasted circulation. The advertising is almost 100% effective, and it's there 24 hours a day."

FCB's Mr. Montenegro says the smaller boards "are a better way to penetrate. People walk and have more time to read, and if they go to a supermarket or bank, at a strategic moment it's there to remind them."

These boards have been in some cities for many decades and "really took off" in the 1950s, says Mr. Whelan. But the junior boards' black and Hispanic "image" has come about because so many whites moved to the suburbs and so many blacks and Hispanics moved into the cities. The junior boards were in the cities first, and the goal of most junior board companies, Mr. Whelan says, is to build more of them in the suburbs as well.

Another image problem is the common perception that advertising to Hispanics on outdoor boards consists mainly of beer, liquor and cigarets. But a wide range of products including toothpaste, soft drinks, oranges, autos, banks, radio stations and the lottery, as well as public service announcements, can be seen. And Tere Zubizarreta, head of Zubi Advertising, Miami, says that liquor and cigarets also may be the main products advertised with outdoor in English, too. With cigarets having been prohibited from tv and the Distilled Spirits Council having imposed a ban on tv for itself, outdoor boards are one of the few remaining options.

Outdoor boards used to reach Hispanics are most often eight-sheets (5 ft.-by-11 ft.) or smaller. Zoning ordinances generally prohibit the larger boards within cities and in the neighborhoods where many Hispanics live.

Of course, eights aren't the only size board to use for Hispanics. Ms. Zubizarreta says she uses 30-sheets for the extensive seasonal liquor ads she places to Hispanics in Miami. The eights don't have enough impact for the short duration (usually August to January) of these campaigns, she says.

Does an advertiser need to use different idioms to reach the different groups of Hispanics—Cubans, Mexicans, Puerto Ricans and South Americans? No. They all speak Spanish and can be reached with the same ad, although there are a few words that translate differently in different parts of the country. Gannett's study mentions how, in a campaign for brown sugar, the word "brown" had to be translated four different ways: One for New York, one for Miami, one for California and one for other parts of the country. But such cases are rare.

Also, while "taste in food and music may vary [among the different Hispanic groups] preferences in cars, appliances or almost anything durable are much less subject to ethnic skews," Gannett's research notes.

The advertiser does have to be careful to use the Spanish language correctly, however. "The more Hispanics feel the advertising is specifically for them," rather than just translated, the better, says Dale Dauten, founder and partner, Research Resources, Atlanta.

This advertising research company has found that "a spiral of enthusiasm" can develop when Hispanics see products advertised to them with care. When this happens, "an incredible brand loyalty is built up," Mr. Dauten says. Nevertheless, this raises an "interesting conflict" because most agencies like to see a "synergy" between the Spanish and English advertising, he says. Yet often ads won't translate literally and another message must be written.

Common mistakes on Hispanic outdoor boards include literal translations, says Ms. Zubizarreta. A literal translation usually requires a paragraph in Spanish for what was said in English in two words, she notes. Also, the copy must be clean and simple in Spanish as well as in English.

Other mistakes she's seen include using a French "grave" accent mark (the Spanish mark is acute), and putting an English-style question mark at the beginning of a Spanish sentence (the Spanish opening question mark should be upside down).

When the copy is good, purchases "can literally explode beyond belief," says Richard Dillon, president of Mendoza, Dillon & Asociados, Newport Beach, Cal., whose $15 million in annual billings are exclusively from Spanish accounts. Mr. Dillon says one big mistake caused by tight budgets is "relying on outdoor boards only to carry the message. This is a difficult burden to place on outdoor."

While liquor and cigaret companies have little option, "other companies have a choice, and it would be our opinion to take an electronic medium first for the basic campaign [tv is the medium most used by Hispanics, the Yankelovich study says] and to use outdoor boards as a reminder."

Mr. Dauten says he "just shakes [his] head" when he sees outdoor boards—a "classic reminder medium"—being used as the *only* medium in Spanish. The advertisers are "doing it on the cheap," he says. Using only outdoor boards doesn't "remind" Hispanics of anything, he says, because there wasn't any main campaign in another Hispanic medium.

Showing a big picture of the package on an outdoor board with no copy may be "useful," Mr. Dauten adds, but it "doesn't convey caring." FCB's Mr. Montenegro says: "I would never do only outdoor" for a campaign.

To those advertisers who believe Hispanics will get the message anyway in the English media, Mr. Dillon says yes and no. While many Hispanics use English media, they are getting "awareness" of the product, but not "motivation," he says. To build motivation, you've got to advertise in Spanish, preferably using broadcast with outdoor boards as reminders.

One company that built awareness among Hispanics and won a first prize from the Eight-Sheet Outdoor Assn. was Ensslin & Hall, Tampa. Lykes Meats of Florida had the greatest share of hot dog sales in the state, says Ensslin's chief operating officer and executive vp, Patrick Hill. But sales among Hispanics were "depressed." Ensslin and Lykes realized they had overlooked the constant influx of new Spanish-speaking people into Florida, while continually advertising in English. This was easy to do because Hispanics "commingle so closely with the population at large," Mr. Hill says.

There in Florida, rubbing shoulders with the English-speaking population, was "a very good and untapped market . . . hungry for more information, especially if you have products that are in their consumption category," he says.

The prize-winning illustration of the Lykes hot dog with "Florida's favorite" and "Made fresh in Florida," printed in Spanish have built awareness, says Mr. Hill. His company is researching whether follow-through purchases are resulting. AA

extent by immigration quotas and policing of border areas by beefed-up patrols.

Meanwhile, the getting's good for advertisers given media development at this point.

Total Hispanic market ad expenditures in 1983 were $224.4 million, up 35% from $166 million in 1982, according to *Hispanic Business* magazine, a national publication in English based in Santa Barbara, Cal.

About 22% of total ad expenditures came from 25 top advertisers ranging from $6.1 million by Philip Morris to $500,000 for H.J. Heinz Corp.

The Spanish-language expenditures of the top 25, however, are less than 1% of the aggregate general market expenditures of those companies.

Most of the advertising has been harvested by broadcast, notes *Hispanic Business*.

National tv or Spanish International Network (SIN) took in $40.5 million; local tv (SIN) added another $40.5 million; independent tv $11.7 million; national radio $30.5 million, and local radio $50 million. This represented $173.2 million or 77% of the total media expenditures.

Spanish-language broadcast may be the best way to reach the Hispanic audience, as marketers claim.

Spanish-language tv stations, overwhelmingly dominated by SIN, are located in the major Hispanic markets and total 23 stations.

The Hispanics moving away from those powerful cultural signals are being tracked by Spanish-language subscription tv and cable.

The largest of the specialized programing services on tv is Spanish-language cable, according to the National Cable Tv Assn. Yet, despite the surge in programing, cable as a Spanish-language medium remains more potential than reality as it does in many Anglo markets. This is because cable systems exist largely in suburban areas where Hispanics are beginning to move (in the top five Hispanic markets, 35% are in suburbs, 50.8% in the central cities) and cable has yet to tap East Los Angeles, Chicago and the New York boroughs of high Hispanic density.

Budget constraints have meant tv programing also is of poor quality compared to English-language network programs and is heavily imported from Spanish-speaking countries, facts that figure into the sales spiel of Pat Michell, Midwest sales representative for Caballero Spanish Media Inc. of New York: "When it comes to television, Hispanics would rather watch 'Hill Street Blues' than a Spanish station."

Ms. Michell may be right, but there are few nonproprietary

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Top 10 Hispanic media markets in 1983
($ millions)

Rank	Market	By medium Tv	Radio	Print	Market total
1	Los Angeles	$16.0	$16.0	$6.5	$38.5
2	New York	15.0	13.0	8.0	36.0
3	Miami	9.0	13.0	8.5	30.5
4	San Antonio	5.0	6.0	—	11.0
5	Chicago	4.0	6.0	—	10.0
6	San Francisco/ San Jose	4.5	4.5	—	9.0
7	El Paso	.8	4.0	—	4.8
8	San Diego	3.5	1.0	—	4.5
9	Phoenix	2.1	1.0	—	3.1
10	Fresno	2.0	1.0	—	3.0
Total		$61.9	$65.5	$23.0	$150.4

Source: *Hispanic Business* magazine, Santa Barbara, Cal.

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Cable

(Continued from Page M-39)

(like soap operas but with a known ending date instead of endlessly evolving); live sports; theater and variety shows.

The GalaVision cable service, now with more than 100,000 subscribers, carries no commercials and feature materials such as movies are presented uncut. According to Andrew Goldman, the "economy of scale" (both audience size and ad revenue in the Hispanic market are too limited) dictates that GalaVision obtain its programs from sources in Latin countries where production costs are lower than in the U.S. "The volume of Spanish-language movie tv production for the U.S. cable market," he says, "will never be large enough to justify original production in this country. So we buy from Mexico and South America, for example."

GalaVision's parent organization, SIN transmits 24 hours of programing daily, including news, current affairs programs and special events. SIN is owned 75% by Televisa, S.A., a Mexican communications conglomerate, and 25% by its founder and president, Rene Anselmo.

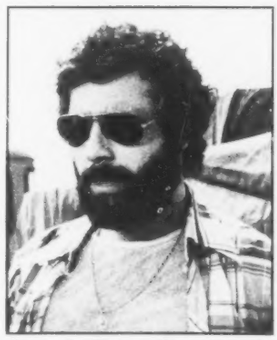
"I am convinced the lack of a national medium . . . is the principal ingredient that keeps Hispanics from gaining recognition," Mr. Anselmo says. "And this is what I envision SIN as doing—becoming the voice that strengthens Latin pride in its cultural heritage.

Emphasis on significant programing, as Ms. Conill suggests, is the mark of the good Spanish-language cable franchises. "Mia Vision emphasizes local coverage in Hialeah," says Malcolm White of Colony Communications. "We have nightly news shows with Jose Yedra as anchor, [we] cover the local night club scene and boxing, and move the cameras out into the community, getting a lot of material locally."

A notable result of this coverage in 1982 was a National Cable Television Assn. ACE—Award for Cable Excellence—presented to Mia Vision for "outstanding commitment to serving a minority audience."

Although most of the Spanish-American Network programming in Houston comes from South American sources, Mr. Gomez de las Barcenas is developing some local shows, too.

And while Southwest Cable in Espanola, N.M., is not doing any local programing yet, it now is devoting one channel to the local community college and one to the public school. It would like to see SIN work with the college to produce local access programs.



Antonio Fagundes stars in "Carga Pesada," a GalaVision series about two Brazilian truckers.

Valley Cable Tv, in California's San Fernando Valley, is another ACE winner, this one a 1983 award for "Innovative Programing," recognizing its program, *Rasgado en Dos* ("Torn in Two") about Spanish poetry. And earlier this year the Los Angeles City Council presented an accolade to Valley for its special, "Un-Tattoo You," which started as a simple documentary on how to remove tattoos, then dealt with the lessening of this militant attitude in young Hispanics and how to get out of street gangs.

Spanish cable operators take various approaches to advertising, but except for SIN, these could be described as "early developmental."

SIN, with an average audience of 1 million, expects revenues of $45 million in 1984. The network is up 34% in sale of commercial time from 1983 (GalaVision cable programing carries no commercial advertising).

Of that total, $30 million is from national tv sales to television, low-power tv and cable. The balance of $15 million is placed in the 12 markets that accept national advertising, including the cable station in Harlingen, Tex., and also includes revenues from border markets with audiences outside the U.S. —Juarez, Nuevo Laredo, Tijuana and Mexicali.

Houston's Spanish-American network carries such major advertisers as Procter & Gamble, General Foods, Johnson & Johnson and the major brewers, while Southwest Cable is not now carrying any commercials but soon will be, including some on the channel with Television and will gradually increase this over the next six months.

Like other components of its business, advertising is very much a local matter for Dynamic Cablevision's Mia Vision. "Advertising is very good," says Malcolm White. "It includes local businesses such as dry cleaners and restaurants. Early in the development of the channel the station management made contacts with affluent Cubans in the area and has good relations with them." Valley Cable in California is slowly picking up some advertising steam, feeling its growth rate is good as it goes from $10,000 a month in revenue for 1983 to projected monthly sales of $11,000 to $14,000 this year and $20,000 by 1985.

Is this the kind of ad revenue to expect from what Char Beals, NCTA programing and marketing vp, describes as "the largest of the specialized programing services on tv"? Perhaps a gradual increase is how it will happen.

"Spanish-language cable can be successful," says Ms. Conill. "It won't happen tomorrow—but it is going to happen." She pauses, and then adds with excitement, "Of course I think the most likely to succeed would be a Spanish-language version of MTV—Music Tv—but you couldn't make it by coming on and playing Latin rhythms of just any type. You would have to use the right balance of the *salsa* from South America, the *mariachi* from Mexico, the *ranchero* from our own Southwest. It could be beautiful and very successful."

She pauses and adds, "I'd better copyright that!" AA

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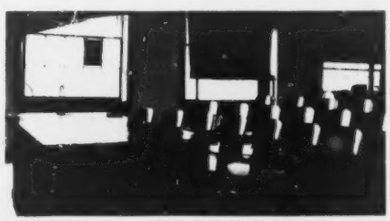

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Media

(Continued from Page M-11)

marketing studies on the market that show the impact of English-language tv on primarily Spanish-speaking audiences and vice versa.

Clinical psychologist Andrew Erlich, whose expertise is in Hispanic market behavior, says English-language tv has as powerful an impact on monolingual Hispanic children as on society at large.

Pressure to watch the English channels comes partly from playmates; some is self-interest (the toys advertised), and a good deal is parental pressure on the child to be the "bridge" for the parent to the new culture.

The commitment of advertisers to reach the Hispanic market via tv also is less than enthusiastic, believes the national sales representative of a major Hispanic tv station.

Requesting anonymity, he estimates that advertising from 50% of the major advertisers on his station is tokenism.

Mr. Erlich traces this to a form of marketer's neurosis caused by the marketer's uneasiness about the impact of Latinos on society, the fear of the unknown, and xenophobia.

Print, the least developed of Spanish-language media, is only a discernible factor in New York, Los Angeles and Miami, a reflection of sheer numbers and the educational attainment of Hispanics before immigrating.

In Chicago, where the number of Hispanics approaches that of Miami, Spanish-language newspapers have had an uneven history.

The *Chicago Sun-Times* discovered the hard way that Hispanics do not necessarily read Spanish. It aimed a weekend section called "Los Vecinos" at the city's half-million plus Hispanics (Mexican and Puerto Rican) in 1981. It lasted two years.

The venture proved costly as the *Sun-Times* tried to reach the population, which is dispersed throughout the city, a fragmentation that killed local advertising by Hispanic merchants.

One reason the newspaper lacked support in the Hispanic neighborhoods was traced to its failure to receive the necessary blessing of the Hispanic social and political hierarchy before launching the product, says a local adman.

The ultimate blow was the discovery that Hispanics in Chicago can be reached by English-language tv, Spanish tv and radio and even English-language print—facts that were discovered in a poll taken to determine where Hispanics got the information that influenced their vote in the Chicago mayoral election in 1983.

The *Los Angeles Times* has been assessing a Spanish-language product in L.A., but is finding the same kind of dispersion and English-language capability factors among the city's Hispanics as found in Chicago.

In the aggregate, 20% of Hispanics in the top five Hispanic markets (Los Angeles, New York, Miami, San Antonio and Chicago) are monolingual in English, 30% are bilingual and 50% are Spanish-speaking only, according to Sosa & Associates, a San Antonio ad agency that tracks the Hispanic markets in the nation's 33 major Hispanic population centers.

That is a fairly strong endorsement for using a combination of English and Spanish-language media to reach them. Indeed, that is what is often recommended by Sosa & Associates.

The answer to reaching the Hispanic market rests in the kind of careful scrutiny Sosa recently took in preparing an ad for Canadian Club. Targeted at bilinguals, its headline was in Spanish as was a poem, lyrical and intimate. A recipe for Canadian Club and 7UP was in English, at the request of Hispanic focus groups, "because we're used to reading recipes in English." Hardly revolutionary. But effective. AA

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ad linage

Advertising pages for U.S., Canadian, and foreign consumer publications—*March*

	Current month		Year-to-date	
	1984	1983	1984	1983
— Art & antiques —				
American Artist	70.0	49.6	183.8	153.0
Antiques	136.3	136.0	456.0	424.3
Antique Monthly	31.1	27.9	96.0	88.0
Art in America (11X)	128.0	115.0	371.4	281.3
Plate World (6X)	72.0	76.0	134.0	160.0
Southwest Art	80.8	77.3	236.6	254.6
Total Group	**455.2**	**481.8**	**1,477.8**	**1,361.2**
% change		**-5.5%**		**+8.6%**
— Auto/cycle/rec. vehicles —				
AutoWeek	103.0	115.0	304.5	348.9
Car & Driver	89.6	74.6	212.1	193.0
Car Collector & Car Classics	20.8	20.5	61.9	60.6
Car Craft	60.3	73.3	145.6	192.4
Cycle	75.1	86.2	143.3	196.5
Cycle Guide	54.9	63.0	113.3	134.6
Cycle World	78.0	78.7	151.0	167.0
Dune Buggies & Hot VWs	72.6	60.1	230.0	174.1
Family Motor Coaching	166.3	131.7	449.9	278.4
4 Wheel & Offroad	66.0	55.6	162.7	157.2
Four Wheeler	66.3	39.8	179.6	104.4
Hot Rod	51.3	55.1	119.6	142.9
Motorcyclist	51.5	64.0	98.0	128.4
Motor Trend	56.6	55.7	144.2	150.8
Motorhome	95.3	73.8	248.6	190.4
Pickup, Van & 4 WD	32.3	33.4	70.4	83.9
Road & Track	106.9	98.1	252.2	238.5
3 Wheeling	29.4	21.5	75.3	68.8
Trailer Life	136.3	105.0	352.4	285.7
Total Group	**1,412.5**	**1,305.1**	**3,514.6**	**3,296.5**
% change		**+8.2%**		**+6.6%**
— Boating & yachting —				
Boating	184.2	130.3	475.7	366.4
Chesapeake Bay	26.0	27.1	82.4	77.2
Cruising World	148.4	139.7	410.0	381.2
Lakeland Boating	—	—	—	—
Motor Boating & Sailing	170.1	139.5	557.6	479.0
Sail	168.6	130.2	438.1	352.2
Sea & Pacific Skipper	62.8	89.3	175.5	223.7
Small Boat Journal (6X)	—	—	42.6	41.6
Trailer Boats	52.0	29.3	112.6	75.9
Western Boatman (6X)	20.3	19.1	59.6	39.1
Yachting	197.2	167.5	567.8	488.7
Total Group	**1,029.6**	**872.3**	**2,921.9**	**2,525.0**
% change		**+18.0%**		**+15.7%**
— Canadian —				
L'Actualite	68.0	50.8	150.1	117.8
Chatelaine				
English Edition A	107.9	94.7	261.2	240.1
French Edition	90.2	87.8	220.6	212.1
City Woman (5X)	54.8	48.1	54.8	48.1
Equinox	50.5	46.5	80.3	87.0
Financial Post Magazine A	38.4	35.9	103.7	89.5
Flare A	57.6	61.8	112.8	107.4
Homemaker's Magazine	89.1	78.9	175.9	175.4
Madam Au Foyer	84.5	63.8	156.0	138.0
Maclean's (52X) A	122.8	83.2	306.8	237.2
Quest Magazine (8X) A	26.4	48.5	26.4	48.5
Reader's Digest				
Canadian English A	114.5	93.7	237.8	208.9
Canadian French A	99.0	79.5	206.6	184.9
Toronto Life	97.7	93.1	209.6	194.4
Vancouver	82.0	96.5	182.2	211.0
Total Group	**1,183.4**	**1,062.8**	**2,484.8**	**2,300.3**
% change		**+11.3%**		**+8.0%**
— Civic/fraternal —				
American Legion	29.7	31.1	94.8	109.1
Elks Magazine (10X)	20.0	24.5	63.0	92.2
Kiwanis Magazine	11.7	13.0	38.3	50.0
Lion (10X)	7.5	6.7	25.1	18.5
Moose Magazine	28.0	25.0	73.0	75.0
Rotarian	11.4	9.8	47.4	40.8
V F W (10X)	31.5	31.8	95.4	107.8
Total Group	**139.8**	**141.9**	**457.0**	**493.4**
% change		**-1.5%**		**-7.4%**
— Comics —				
Archie Comic Group (6X)	—	—	10.0	10.0
DC Comics	8.0	8.0	26.0	26.0
Marvel Comics Group	10.0	10.0	30.0	30.0
Total Group	**18.0**	**18.0**	**66.0**	**66.0**
% change		**+00.0%**		**+00.0%**
— General —				
American Forests	8.0	11.3	23.8	35.5
American Health (6X)	56.8	33.0	110.8	64.6
American West (6X)	29.2	22.3	54.8	51.7
The Atlantic A	52.0	44.4	111.7	111.7
Audubon Magazine (6X)	30.4	40.2	54.0	71.1
Bon Appetit A	75.1	84.2	210.0	220.8
Changing Times	53.8	51.9	142.1	110.5
Cuisine Magazine	50.7	32.9	143.1	89.0
Ebony	86.4	96.2	222.5	242.1
Fifty Plus	36.5	28.3	115.0	81.0
Food & Wine	35.3	35.1	103.7	97.0
Games	23.2	27.0	68.2	89.3
Geo	39.8	34.1	110.5	105.8
Gourmet	82.3	76.1	194.4	178.0
Home Entertainment (6X)	—	—	38.0	34.7
Harper's Magazine A	28.6	14.3	74.4	48.2
Life	40.0	39.0	152.2	157.9
Modern Maturity (6X)	—	—	45.2	40.6
Money	124.2	126.5	319.3	296.0
Moneysworth (4X)	9.8	17.2	27.0	34.6
Mother Earth News (6X)	51.0	68.9	113.8	140.6
Mother Jones	—	—	—	—
National Geographic	27.1	39.9	57.8	75.3
Natural History	47.1	40.1	139.3	110.3
Prevention	65.0	71.0	213.2	221.6
Psychology Today	27.0	31.0	69.9	76.8
Reader's Digest A	83.3	63.4	227.8	197.4
Saturday Evening Post (9X)	37.4	50.3	76.7	90.3
Signature	74.0	78.1	170.2	171.3
Smithsonian	100.9	98.9	257.9	226.7
Success	34.3	37.8	106.2	112.9
Town & Country	156.8	159.6	353.5	336.5
Travel/Holiday	73.5	59.2	160.6	144.3
Travel & Leisure	129.2	114.6	296.9	240.7
Vanity Fair	24.7	168.4	72.0	168.4
Video	56.8	63.3	196.8	194.5
Video Review	49.5	58.0	168.1	187.3
Writers Digest	34.8	24.3	83.6	74.0
Yankee	79.0	85.0	261.0	269.6
Total Group	**2,013.5**	**2,125.8**	**5,185.4**	**5,198.6**
% change		**-5.3%**		**-0.3%**
— Home —				
Americana (6X)	—	—	—	—
Architectural Digest A	140.6	138.7	313.1	308.2
Better Homes & Gardens	111.3	110.7	276.7	261.3
Colonial Homes (6X)	71.8	73.3	129.8	122.8
Country Journal	45.5	45.1	143.7	145.2
Country Living	59.1	49.2	167.1	134.4
Dallas Ft. Worth Home & Garden	68.6	63.1	173.9	171.1
Early American Life (6X)	—	—	29.4	24.4
Family Food Garden (6X)	—	—	121.0	119.6
Family Handyman (10X) A	83.2	69.2	208.5	198.8
Flower & Garden (6X)	—	—	60.3	53.2
Home	60.2	46.1	137.3	95.8
Horticulture	26.1	31.9	83.1	104.3
House Beautiful	93.5	92.6	223.0	225.9
House & Garden	81.7	51.8	200.1	195.5
Houston Home Garden	95.8	96.8	251.8	261.2
Metropolitan Home	53.9	55.3	158.4	155.0
New Shelter (9X)	50.8	35.7	152.5	142.4
1001 Home Ideas	43.7	29.0	103.3	90.4
Organic Gardening	77.0	84.5	260.4	284.4
Phoenix Home Garden	61.0	46.2	175.8	128.3
San Diego Home/Garden	53.5	62.5	172.2	180.8
Southern Accents (4X)	81.8	—	130.8	81.3
Southern Living	141.7	141.3	337.0	321.8
Sunset Magazine A	145.3	161.0	345.1	353.2
Texas Homes	72.0	72.9	224.3	202.0
Workbench (6X)	69.7	66.5	131.1	134.5
Total Group	**1,787.8**	**1,623.4**	**4,709.7**	**4,333.6**
% change		**+10.1%**		**+8.6%**
— In-flight & other passenger —				
Aboard Group (7) (4X)	—	—	17.1	26.4
Alaskafest	43.8	43.0	122.9	110.7
American Way	95.2	92.9	297.0	235.3
East/West Network				
Amtrak Express	30.5	50.5	88.8	113.7
Continental	61.7	62.5	166.7	166.7
Eastern Review	121.3	113.5	353.7	280.5
Ozark	36.7	51.0	124.9	111.3
PSA Magazine	91.2	85.0	256.4	216.6
Pan Am Clipper	68.0	41.7	163.7	118.7
Republic Scene	56.2	57.8	164.9	134.8
United	123.2	95.0	317.3	230.3
USAir	64.2	63.3	175.7	153.8
Western's World	55.8	63.0	173.7	156.2
Halsey Publications				
Air Cal	48.3	28.0	134.9	79.9
Delta Sky	81.2	79.7	228.3	178.6
Frontier	31.6	36.8	100.7	108.6
Northwest Orient	24.7	39.0	88.7	104.6
Skylite	18.0	12.3	57.0	31.5
TWA Ambassador	55.4	53.2	170.1	108.6
Hawaii	21.0	16.3	65.4	49.4
Pace (6X)	88.3	33.1	166.1	68.9
Southwest Airlines	89.9	106.3	252.2	281.3
Spirit of Aloha	20.5	16.0	62.3	46.6
Total Group	**1,326.7**	**1,239.9**	**3,748.5**	**2,997.2**
% change		**+7.0%**		**+25.0%**
— Men's —				
Esquire	122.8	128.0	220.8	228.0
Firehouse Magazine	50.0	45.0	117.5	112.9
Gentlemen's Quarterly A	188.0	151.2	366.8	277.4
Penthouse A	40.1	54.6	133.6	154.7
Playboy A	58.8	66.1	191.4	212.5
Total Group	**459.7**	**444.9**	**1,030.1**	**985.5**
% change		**+3.3%**		**+4.5%**
— Metropolitan —				
Aloha (6X)	26.5	25.5	51.7	46.7
Atlanta	59.8	64.0	148.4	137.0
Baltimore	56.8	50.6	157.0	154.5
Boston	127.3	121.8	356.7	347.0
California	65.0	55.1	145.4	125.7
California Living	62.3	52.5	136.5	139.8
Charlotte (10X)	18.3	18.0	41.3	58.1
Chicago	121.2	120.2	337.6	293.7
Chicago's North Shore	80.7	74.5	230.6	218.6
Cincinnati	41.2	50.1	128.9	146.2
Cleveland	61.8	70.0	197.7	178.8
Coast (38X) D	300.4	275.0	448.0	399.7
Columbus Monthly	64.4	56.9	163.1	148.8
Commonwealth	—	—	—	—
Connecticut	68.7	65.7	215.3	201.9
Country Magazine	40.0	25.8	93.0	65.3
County Life	44.0	—	129.0	40.0
D/Magazine, Dallas/Ft. Worth	108.1	104.8	293.9	274.5
Denver	32.7	31.7	77.4	80.7
Exclusively Yours, Wisconsin (15X)	47.5	54.0	155.9	162.9
Grand Rapids	75.3	51.7	145.3	127.4
Gulfshore Life (10X)	103.4	78.5	305.4	231.3
Honolulu	53.3	59.6	161.3	179.9
Houston City	74.1	59.2	202.5	166.7
Indianapolis	51.4	38.8	147.4	130.4
Kansas City	26.4	25.3	98.1	79.0
Los Angeles	183.0	172.0	500.0	474.0
Louisiana Life (6X)	66.1	69.9	129.3	137.9
Madison	48.0	40.0	140.0	120.0
Metropolitan Detroit	96.7	—	96.7	—
Miami/South Florida	71.2	77.3	251.2	251.4
Milwaukee	41.7	10.6	98.9	21.2
Minneapolis/St. Paul	86.8	75.5	228.0	203.7
Monthly Detroit	35.5	52.1	97.8	147.5
Nashville	32.0	50.0	110.0	158.0
New Jersey Monthly	50.6	47.8	145.7	134.0
New Mexico	24.2	22.6	99.2	57.7
Ohio	61.6	33.1	137.9	97.8
Oregon	—	—	—	—
Orlando	71.3	81.0	222.3	217.0
Palm Beach Life	108.8	101.3	336.4	302.7
Palm Springs Life	135.2	136.1	453.4	438.6
Philadelphia	107.7	119.0	323.4	329.1
Phoenix	90.0	70.7	264.3	232.0
Pittsburgh	56.5	54.2	161.4	147.7
St. Louis	64.5	48.5	160.5	140.5
San Diego	144.7	138.7	368.5	368.4
San Francisco	66.4	61.0	172.6	151.0
San Francisco Focus	52.8	43.0	129.5	112.5
Shenandoah/Va Town&Country (6X)	48.0	35.0	97.0	63.6
Tampa Bay Monthly	37.0	—	156.3	—
Texas Monthly	114.3	120.4	291.4	272.2
Twin Cities	69.9	46.2	163.2	118.8
Washington Dossier	44.0	39.5	130.7	131.3
The Washingtonian	144.0	142.0	390.0	383.0
Total Group	**3,944.8**	**3,516.8**	**10,325.7**	**9,197.4**
% change		**+12.2%**		**+12.3%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	26.3	28.7	75.3	84.3
Secrets	26.3	28.7	75.3	84.3
True Confessions	26.3	28.7	75.3	84.3
True Experience	26.3	28.7	75.3	84.3
True Love	26.3	28.7	75.3	84.3
True Romance	26.3	28.7	75.3	84.3
Sterling Women's Group				
Daytime TV	27.5	31.3	81.5	92.4
Modern Screen	—	—	20.5	34.8
Movie Mirror (6X)	—	31.3	41.0	31.3
Soap Opera Stars	—	25.0	40.0	73.5
TV Movie Screen (6X)	—	31.3	—	66.1
TV Picture Life (6X)	—	—	41.0	29.3
Teen Bag (6X)	7.7	—	14.2	2.4
Total Group	**193.0**	**291.1**	**690.0**	**835.6**
% change		**-33.7%**		**-17.4%**
— Music/entertainment —				
American Film (10X)	32.7	39.3	73.0	80.5
Audio	52.6	41.9	174.5	127.3
Circus Magazine	33.5	20.3	99.9	74.3
Dance Magazine	63.4	65.1	193.7	182.2
Musician	62.5	49.8	185.2	178.2
Playbill	53.7	50.5	146.1	144.8
Record	20.0	4.1	57.2	15.5
Stereo Review	41.7	55.2	124.2	140.6
Total Group	**360.1**	**326.2**	**860.1**	**943.4**
% change		**+10.4%**		**-8.8%**
— Newspaper, Sun. magazines —				
Family Weekly A	58.1	87.8	188.7	263.6
Parade	53.1	76.9	176.2	232.6
Total Group	**111.2**	**164.7**	**364.9**	**496.2**
% change		**-32.5%**		**-26.5%**
— Outdoor & sport —				
Alaska	48.6	41.7	120.8	106.5
The American Handgunner (6X)	39.2	40.9	79.0	77.9
American Hunter	19.1	16.7	49.9	47.1
American Rifleman	25.3	21.5	76.3	69.9
Backpacker (6X)	43.0	49.7	74.2	85.9
Bass Master (8X) A	91.8	69.8	188.9	170.7
Bicycling (9X)	116.4	104.8	209.3	192.7
Field & Stream	111.2	128.6	247.9	280.3
Fins & Feathers A	73.4	86.5	166.6	150.1
Fishing World (6X)	85.0	88.1	116.3	120.3
Florida Sportsman	129.4	114.4	301.8	254.0
Flying	44.4	39.5	113.9	100.2
Fur-Fish-Game	20.2	18.6	70.9	64.2
Golf Digest	132.2	140.8	280.1	280.4
Golf Magazine	75.0	64.3	344.4	297.2
Guns	24.1	25.2	79.8	80.9
Guns & Ammo	41.8	46.2	113.2	127.2
Muscle & Fitness	99.0	104.0	320.0	312.0
Outdoor Life	118.7	85.6	258.7	225.0

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. D. Four issues in March. E. Includes inserts totaling 10 pages. * All affiliated with Sunday Mag/Net, except Los Angeles Times Home Magazine and New York Times Magazine.

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ad linage

(Continued from Page 67)

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983
Outside Magazine	51.3	52.0	83.6	52.0
Petersen's Hunting	34.1	29.3	89.1	90.4
The Runner	39.4	33.7	112.6	107.9
Runner's World (13X)	43.3	41.9	121.1	122.1
Salt Water Sportsman	104.3	76.7	250.0	202.0
Shooting Times	40.8	31.1	116.1	97.3
Ski (8X) A	56.9	76.5	217.0	209.7
Skiing (7X)	54.2	62.4	215.3	209.5
Skin Diver	78.2	67.6	238.1	215.9
Southern Outdoors (8X)	58.5	59.8	94.9	100.6
Sport	41.3	30.3	126.5	91.2
Sports Afield	105.0	110.7	256.5	257.2
Tennis	76.9	73.8	182.3	186.3
Western Outdoors (10X)	56.7	41.2	104.1	95.3
World Tennis	38.0	65.1	87.6	124.5
Total Group	**2,216.7**	**2,139.0**	**5,506.8**	**5,204.4**
% change		**+3.6%**		**+5.8%**

— Photography —

American Photographer	40.8	54.3	112.4	145.7
Petersen's Photographic	28.4	32.8	89.0	96.9
Popular Photography	94.2	118.0	278.9	344.5
Total Group	**163.4**	**205.1**	**480.3**	**587.1**
% change		**-20.3%**		**-18.2%**

— Religious —

BBI Jewish Monthly (10X)	24.5	29.1	64.8	69.4
Christian Herald	34.5	44.8	101.2	109.3
Christian Life	32.6	28.9	83.8	77.8
Christianity Today	76.5	81.2	191.5	223.3
Inside (4X)	90.3	70.0	90.3	70.0
Moody Monthly	61.7	68.6	158.9	171.5
Today's Christian Woman (6X)	41.7	32.7	65.8	32.7
Total Group	**361.8**	**355.3**	**756.3**	**754.0**
% change		**+1.8%**		**+0.3%**

— Science/electronic/mechanic —

Compute	91.6	131.4	296.4	369.4
Computers & Electronics	40.0	65.8	141.4	265.7
Creative Computing	132.4	176.2	423.6	544.9
Discover	44.3	40.1	122.2	127.0
Electronic Games	—	—	—	—
Family Computing	53.6	—	184.7	—
Mechanix Illustrated	84.5	73.9	198.1	198.5
Omni	57.3	66.4	163.1	166.0
Personal Computing	166.0	200.7	525.4	570.3
Popular Mechanics	101.1	105.5	271.0	266.4
Popular Science	94.9	79.5	247.8	226.4
Science Digest	22.9	38.6	73.4	98.8
Science 84 (10X)	50.5	48.9	89.8	87.2
Scientific American	64.5	51.2	179.1	136.0
Spectrum	108.7	72.7	277.0	231.1
Total Group	**1,020.7**	**1,150.9**	**3,193.0**	**3,227.7**
% change		**-11.3%**		**-1.0%**

— Women/fashion/service —

Bride's Magazine (6X) A	220.5	229.1	737.5	724.1
Cosmopolitan A	201.3	198.7	536.1	503.2
Essence	78.0	86.8	223.2	218.5
Family Circle A	163.9	175.9	407.2	426.1
Glamour	199.4	182.4	429.5	427.1
Good Housekeeping A	137.1	169.1	405.6	449.2
Handmade (6X)	26.4	—	52.8	30.4
Harper's Bazaar	206.8	172.1	414.3	338.8
Health	40.2	31.0	111.3	83.5
Ladies' Home Journal	109.6	106.7	299.4	262.1
Ladycom	33.0	26.2	113.5	100.7
Lady's Circle	5.7	11.6	22.8	28.6
Mademoiselle	135.6	149.3	340.9	319.9
McCall's	88.9	94.6	249.6	244.2
Modern Bride (6X)	210.9	199.8	624.7	597.9
Ms	54.6	40.0	129.9	112.8
New Woman	57.0	47.9	139.2	129.5
Parents Magazine A	71.6	78.6	197.5	206.4
Playgirl	33.2	39.1	107.8	121.5
Redbook	92.4	90.9	249.5	231.2
Self	102.1	81.2	240.2	193.3
Seventeen	182.2	107.9	322.7	247.5
Shape	51.0	49.0	154.0	122.0
Soap Opera Digest	29.5	28.7	83.9	64.2
Teen Magazine	50.0	51.2	115.7	116.8
True Story A	56.7	57.5	156.7	168.4
Vogue	362.3	301.5	745.5	647.6
W Magazine	153.0	124.2	377.4	321.1
Weight Watchers	30.2	33.0	91.0	88.9
Woman's Day A	109.9	111.9	277.6	287.7
The Workbasket (10X)	38.1	52.7	124.6	127.2
Working Mother	70.4	77.9	192.3	188.4
Working Woman	102.4	100.4	249.0	247.4
Total Group	**3,503.9**	**3,306.6**	**8,922.9**	**8,168.2**
% change		**+6.0%**		**+9.2%**

— Youth —

Boys' Life	16.3	22.1	50.5	68.2
Campus Life	65.3	78.3	156.4	151.7
Total Group	**81.6**	**100.4**	**206.9**	**219.9**
% change		**-18.7%**		**-5.9%**

February

	Current month 1984	Current month 1983	Year-to-date 1984	Year-to-date 1983

— Business —

Atlanta Bus. Chronicle (52X)	46.4	22.0	77.0	62.5
Austin Business Journal (26X)	32.8	—	65.3	—
Barron's (52X)	179.2	182.9	379.3	370.8
Boston Business Journal	71.4	47.4	157.8	101.9
Business Week (52X) A	334.7	331.1	587.3	568.8
California Business	61.0	35.0	128.9	89.0
Capital District Bus. Review	38.1	29.7	84.0	66.2
Corporate Report/Kansas City	47.7	38.8	133.1	81.8
Corporate Report Minnesota	67.0	71.9	146.5	147.8
Crain's Chicago Bus. (52X) E	130.3	115.0	244.7	198.5
Crain's Cleveland Bus.	59.5	38.4	114.1	93.7
Dallas-Ft. Worth Bus. (52X)	35.0	33.5	68.3	71.0
Dun's Business Month	61.0	68.0	183.0	174.0
The Executive	50.2	39.8	100.4	79.6
Financial World (24X)	22.0	40.1	52.8	67.7
Florida Trend	70.8	61.7	162.5	130.8
Forbes (26X)	224.5	187.8	486.1	393.7
Fortune (26X) A	189.2	165.0	387.7	292.8
Frequent Flyer	53.8	48.5	89.5	84.4
Hawaii Business	43.0	44.2	79.8	88.8
High Technology D	32.2	17.9	50.6	48.8
Houston Bus. Journal (52X)	—	—	—	—
Inc. Magazine A	93.2	103.3	194.5	168.0
Income Opportunities (10X)	66.5	66.6	66.5	66.6
Industry Week (26X) A	103.5	87.3	181.8	165.1
Indianapolis Business Journal	105.5	83.9	210.6	178.7
Nation's Business A	18.2	27.4	37.1	47.4
New England Bus. (20X) B	59.1	52.0	100.7	90.2
New Jersey Success	—	—	—	—
New Orleans Citibusiness	107.8	103.4	223.4	215.6
Pacific Business News (52X)	98.6	89.0	185.2	182.7
Philadelphia Bus. Journal	89.8	38.9	168.8	99.3
Pittsburgh Bus. Times (52X)	43.6	36.2	95.6	89.2
Savvy	—	—	—	—
St. Louis Business Journal	123.3	88.1	253.4	187.2
Texas Business	51.3	46.1	109.7	79.6
Venture	—	—	—	—
Total Group	**2,810.2**	**2,524.8**	**5,606.0**	**4,782.2**
% change		**+11.3%**		**+17.2%**

— Newspaper Sunday magazines* —

Arizona Republic	55.2	69.0	116.1	136.8
Boston Globe	179.9	126.9	340.4	269.9
Chicago Tribune	47.5	65.9	105.6	135.5
Cincinnati Enquirer	—	—	—	—
Cleveland Plain Dealer	45.5	55.6	79.1	108.2
Columbus Dispatch	42.1	39.6	70.8	71.4
Dallas Times Herald	64.7	66.3	126.3	127.0
Denver Post	—	—	—	—
Detroit News	84.5	87.6	149.5	159.9
L.A. Times Home Magazine	88.3	64.3	175.1	116.0
Louisville Courier-Journal	58.6	76.1	120.3	137.8
Miami Herald	52.0	53.7	94.7	108.7
New York News	91.8	48.8	115.7	90.5
New York Times Magazine	247.6	338.7	452.0	537.3
Philadelphia Inquirer	51.6	53.8	105.9	106.1
Toledo Blade Magazine	29.0	54.4	64.6	91.8
Washington Post	89.9	90.6	161.6	159.8
Total Group	**1,228.2**	**1,291.3**	**2,277.7**	**2,356.7**
% change		**-4.9%**		**-3.4%**

— Weeklies/bi-weeklies —

The Advocate (25X)	94.8	84.7	214.1	231.6
Army Times Military Group				
Air Force Times (52X)	135.7	138.6	260.7	274.8
Army Times (52X)	129.3	134.5	250.7	266.8
Navy Times (52X)	152.4	156.5	290.0	313.0
The Times Magazine	15.2	9.3	22.0	15.1
The Blood-Horse (52X)	541.9	484.8	1,213.5	1,126.3
Capper's Weekly (26X)	34.9	28.1	73.8	54.0
Commonweal (22X)	8.2	7.3	16.1	16.5
Golf World (43X)	60.3	57.0	127.0	128.2
Grit (52X) A	26.4	28.7	63.3	65.8
National Journal	23.7	29.0	49.0	46.0
National Review	29.5	36.4	48.5	57.3
New Republic (48X)	29.0	27.2	53.3	52.2
New York Magazine (50X)	170.1	206.0	315.1	342.9
New Yorker (52X)	262.5	249.8	467.0	475.4
Newsweek (52X) A	174.8	249.6	380.3	393.2
People (52X)	206.7	236.2	391.3	400.3
Rolling Stone (25X)	86.2	68.6	126.7	107.5
Sporting News (52X)	52.5	56.7	99.3	103.3
Sports Illustrated (52X) A	249.9	217.9	404.6	379.8
Time (52X) A	194.6	193.3	371.7	386.5
Travelhost (52X) C	—	—	—	—
TV Guide (52X) A	359.4	365.3	686.9	711.9
Us Magazine (26X)	28.0	33.2	76.5	90.5
U.S. News & World Report (52X) A	109.6	137.4	206.5	246.3
Total Group	**3,175.6**	**3,236.1**	**6,207.9**	**6,239.2**
% change		**-1.9%**		**-0.5%**

— Foreign —

Good Housekeeping Foreign Editions				
Australia	26.0	24.4	64.7	63.6
Japan	46.7	43.9	122.8	89.8
Great Britain	73.8	68.1	119.5	115.8
Buenhogar				
Central America	—	—	—	1.0
Chile	—	—	—	—
Colombia	12.0	22.7	23.7	39.8
Dominican Republic	1.0	5.0	8.0	17.0
Ecuador	4.0	6.3	16.0	9.3
Mexico	19.5	45.8	36.8	74.8
Peru	6.0	5.5	15.5	17.3
Puerto Rico	11.0	9.0	18.0	18.3
U.S.	12.5	4.5	22.0	12.3
Venezuela	10.5	18.0	22.5	35.0
Geomundo				
Central America	4.5	—	5.8	2.0
Chile	3.5	1.0	4.8	4.0
Colombia	9.0	5.0	10.0	11.0
Ecuador	3.0	1.0	4.0	4.0
Mexico	4.5	2.0	4.8	8.0
Peru	3.5	—	4.8	3.0
Puerto Rico	1.5	1.0	3.8	3.0
U.S.	3.5	1.0	4.5	1.0
Venezuela	3.5	12.2	13.8	18.2
Hombre De Mundo				
Central America	3.0	4.0	8.0	8.0
Chile	4.0	4.0	8.0	8.0
Colombia	5.0	9.5	9.0	17.5
Ecuador	3.0	5.0	7.0	10.0
Mexico	5.0	8.0	9.0	14.5
Peru	3.0	2.0	7.0	5.0
Puerto Rico	3.0	5.5	6.0	8.5
U.S.	2.0	1.0	3.0	1.0
Venezuela	11.0	23.3	20.0	33.3
Ideas Para Su Hogar				
Colombia	12.0	11.5	15.0	24.5
Ecuador	6.0	—	8.0	1.0
Mexico	5.0	18.2	6.3	32.8
Peru	3.0	2.0	7.5	5.0
Puerto Rico	0.5	—	0.5	—
U.S.	8.5	—	11.5	—
Venezuela	5.5	10.5	14.0	18.0
Mecanica Popular				
Argentina	4.8	6.8	10.7	13.5
Central America	12.8	14.3	22.5	25.7
Chile	4.5	6.6	8.0	11.8
Colombia	11.5	15.0	20.7	33.2
Mexico	9.2	9.7	16.5	18.8
Peru	14.7	18.7	24.3	33.3
U.S.	3.0	2.0	5.7	3.0
Puerto Rico	13.5	15.5	24.2	26.8
Venezuela	14.3	22.2	25.0	42.8
The Ring en Espanol				
U.S.	2.0	3.0	3.3	4.0
Venezuela	1.0	2.0	1.0	3.0
Vanidades Continental				
Central America	5.3	6.0	6.7	8.2
Chile	—	5.7	—	6.3
Colombia	30.8	34.3	51.8	55.5
Dominican Republic	7.7	19.2	8.7	25.3
Ecuador	15.7	9.7	19.3	12.5
Mexico	43.3	70.3	68.0	119.3
Peru	6.7	20.0	16.3	30.5
Puerto Rico	26.2	34.0	37.7	53.7
U.S.	36.3	43.2	66.8	70.7
Venezuela	26.3	52.8	43.0	73.3
Business Week Int'l	90.2	112.5	156.6	203.5
Cosmopolitan Foreign Editions				
Australia	32.3	45.4	79.4	90.0
Brazil	24.0	29.0	54.0	62.0
France	106.7	30.7	175.0	67.8
Germany	62.4	34.7	92.4	53.0
Great Britain	64.0	70.0	134.3	109.0
Greece	28.0	27.0	66.0	77.0
Holland	26.0	12.0	35.0	18.0
Italy	28.0	42.1	43.7	60.0
Japan	26.7	26.6	54.3	59.9
Cosmopolitan en Espanol				
Central America	—	2.3	—	3.2
Colombia	3.2	12.3	3.2	18.2
Ecuador	—	1.7	—	2.3
Mexico	22.2	35.2	37.0	60.3
Peru	—	5.7	—	10.3
Puerto Rico	16.2	15.5	22.3	27.5
U.S. (Spanish language)	21.8	14.3	33.5	27.0
Venezuela	8.5	15.2	15.0	22.0
International Communications				
African Business	20.2	38.0	33.5	54.5
New African	17.9	25.3	37.7	45.8
The Middle East	18.6	28.0	37.0	41.5
International Management				
Africa	12.0	16.5	18.8	27.3
Europe	26.8	31.3	44.8	52.0
Latin America	11.3	10.3	14.3	15.0
Middle East	14.7	13.5	30.2	22.7
Pacific	11.7	15.5	17.3	26.0
Johnston International				
Alam Attyarat	49.7	55.2	90.3	96.2
Ejecutivo	6.3	8.3	6.3	8.3
Modern Africa	13.6	18.5	3.6	18.5
Modern Asia	20.0	34.1	20.0	34.1
Newsweek International A				
Atlantic	60.3	68.5	110.4	112.5
Latin America	15.3	23.2	39.3	43.6
Pacific	47.2	50.3	99.2	89.6
Progreso (9X)	6.5	11.0	6.5	11.0
Reader's Digest				
Arabic	—	7.0	8.0	16.5
Asian	87.5	142.5	243.0	343.5
Australian	72.8	54.0	131.8	80.5
Belgian-Flemish	47.5	53.5	72.5	84.5
Belgian-French	41.0	43.5	61.5	66.0
British	45.2	59.2	89.8	116.6
Chinese B	110.0	98.5	204.5	178.3
Danish	30.3	32.3	54.6	76.6
Dutch	25.5	17.5	52.5	48.5
Finnish	36.0	63.0	73.0	100.5
French	35.7	54.5	69.0	84.8
German	65.3	75.5	122.5	118.2
Greek	7.5	—	7.5	—
Iberian	13.0	25.5	18.0	38.5
Indian-English	70.0	77.0	137.0	135.5
Indian-Hindi	3.0	1.5	7.0	3.0
Italian	37.0	39.0	56.5	66.0
Japanese	40.0	41.4	63.9	84.50
Korean	20.5	16.8	45.0	36.1
Latin American				
Argentina	17.0	12.0	32.5	17.0
Brazil	2.0	10.0	4.0	20.0
Central American	10.0	8.0	15.0	13.0
Chile	15.0	15.5	27.5	24.0
Colombia	23.0	28.0	47.0	50.5
Ecuador	10.0	11.0	16.0	19.5
Mexico	35.0	37.6	55.4	70.9
Peru	10.0	9.5	17.0	17.0
Puerto Rico	5.0	6.5	8.0	12.0
U.P.B.	8.0	14.0	10.0	22.5
U.S. Spanish	4.5	23.0	14.0	32.5
Venezuela	10.0	16.0	13.0	23.5
New Zealand	80.0	85.0	120.5	125.5
Norwegian	38.8	31.5	53.6	44.5
Portugal	24.0	20.0	39.0	45.0
South African	96.3	92.0	142.3	119.0
Swedish	13.0	15.5	40.0	31.5
Swiss-French	15.3	24.6	37.3	35.7
Swiss-German	22.6	31.0	50.2	47.0
Time International				
Time-Asia	59.6	64.9	112.2	118.0
Time-Atlantic	75.6	76.2	114.4	131.3
Time-Canada	159.0	126.8	264.7	209.2
Time-Latin America	30.7	29.2	51.3	60.3
Time-South Pacific	84.6	103.1	139.4	155.4
Visao (52X)	109.5	86.2	225.5	231.9
Vision/Latin America (26X) A	17.3	24.7	28.1	43.1
Total Group	**3,304.5**	**3,677.8**	**5,946.2**	**6,868.4**
% change		**-10.1%**		**-13.4%**

Hardee's

(Continued from Page 1)

cuit breakfast menu has been strong enough to force McDonald's to trade its English muffins for biscuits there and to consider adding them elsewhere. Estimated to account for as much as 25% of Hardee's per-store sales, breakfast should get at least a proportionate share of the new campaign's attention.

Served on a natural-grain bun and topped with lettuce, tomato and bacon, the new Turkey Club is positioned to appeal to customers (especially women) interested in lighter, nonbeef meals.

No plans for salad bar

Hardee's so far has resisted jumping on fast-food's salad-bar bandwagon, but the turkey item is intended to help broaden Hardee's customer base as it takes on McDonald's, Burger King and Wendy's more aggressively.

Broadcast and print advertising for the rollout, themed "Tackle a turkey," also is a part of the transition. Missing from the spots is the chain's longtime tag line, "Best eatin' all around," in anticipation of the network campaign's new, expectedly tougher "umbrella" theme.

A subsidiary of privately held Imasco Ltd., Montreal, Hardee's already has the size to merit membership in the Big 3 burger-chain club. It has converted to the Hardee's banner most of the 700-store Burger Chef chain it acquired in 1982 from General Foods, quickly moving it into new markets.

After cooling somewhat last year, new-store construction again is on the rise.

Industry sources estimate Hardee's 1983 systemwide (company and franchised stores) sales at about $1.5 billion. That keeps it within striking distance of No. 3 Wendy's (with nearly $2 billion in sales) and No. 2 Burger King (about $3 billion), while leaving it at least a respectable distance behind the unapproachable market leader, $8.7 billion McDonald's.

Where Hardee's traditionally has lagged behind the other major burger chains is in advertising spending, relying instead more heavily on promotions than have the others. But changes in that past strategy already are evident.

According to the Television Bureau of Advertising, Hardee's spent $17.6 million on tv advertising last year, compared with the $186 million spent by McDonald's, Burger King's $82.5 million and Wendy's $49.7 million. Yet Hardee's 63% increase in spending over 1982 greatly outdistanced the ad spending growth posted by any of the Big 3.

Heavy regional concentration

Hardee's heavily regional store concentration, which has kept it away from network tv until now, is generally seen as the chain's primary weakness in its efforts to take on its larger rivals.

Although strongly represented in the Southeast and part of the upper Midwest—Hardee's has no stores west of Salt Lake City—it is weak in the Northeast and has yet to enter such metropolitan areas as Chicago.

Benton & Bowles has been able to sell some of the future network feed in the West in order to minimize the cost-inefficiency of the buy, according to Hardee's senior vp-marketing Ron Wertheim.

The network advertising won't be funded by requiring an earmarked allocation of per-store sales, as do McDonald's, Wendy's and Burger King (commonly 1% and up).

However, regional co-ops do provide proportionate shares of a national production fund that produces advertising for systemwide use. But Hardee's is conceded to be one of the industry's masters at promotional marketing. A glass premium featuring the Smurfs and a Christmas season offering of stuffed Shirt Tales cartoon characters both did well, the company says.

Industry sources say Hardee's per-store sales were up an average 15% last November and December partly on the strength of the Shirt Tale promotion, despite an unusually high upcharge for the toys of $1.59 (and higher where demand allowed) with a sandwich and beverage purchase. Conventional wisdom at most fast-food chains holds that premiums priced above $1 don't move.

Future promotions uncertain

Although it already has run a children's meal promotion tied to the Biskitts cartoon characters this year, Mr. Wertheim said the extent of Hardee's future commitment to promotional marketing still is being debated.

One promotion Hardee's hasn't joined is the 39¢ hamburger offer still in effect in some McDonald's and Burger King stores (AA, Jan. 16).

Mr. Wertheim said sales haven't been hurt by the rivals' price-cutting, and he said Hardee's would rather coupon selectively than slash prices.

"My feeling is that kind of pricing cheapens a product everyone [in the industry] is trying to talk about and serve in a quality way," he said.#

the advertising market place

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NORTH CAROLINA ADVERTISING CONTRACT
The North Carolina Department of Commerce is statutorily required to review and evaluate periodically the contractual relationship between itself and the advertising agency that handles its travel and tourism and industrial development media promotional efforts. The current contract will expire on June 30 of this year. The firm of McKinney, Silver and Rockett of Raleigh, North Carolina is presently under contract with the Department of Commerce. The relationship with this firm has been quite satisfactory to the Department and the firm will be eligible for consideration in the selection of an advertising firm for the contract period beginning July 1, 1984. Firms interested in being considered for this contract should contact Charles Heatherly, Director, Division of Travel and Tourism, 430 North Salisbury Street, Raleigh, North Carolina 27611, in writing by April 11, 1984 for details and requirements associated with the contract.

Merchandise Buyer
Walter Drake & Sons, Inc., a national mail order company, has an opening for an experienced merchandise buyer. Qualified candidates will have a minimum of two years buying experience with a national mail order firm, and a demonstrated record of successful buying. Must be sales results oriented, analytical and organized, with strong verbal and written communication skills. Attractive salary and benefits package. Please send resume and salary history in confidence to:
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Boulder, Colorado 80301

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ART DIRECTOR
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Promotion Manager
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3/27/84
C 2710-1

Color portfolio of MPA's Kelly award nominees — Page M-49

Advertising Age ®

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Times were a lot happier for the Pizza Time Theatre family when they were the darling of Wall Street. The chain had everything going for it; now virtually everything goes against it.

Why the fun's all gone for the pizza-video king

By SCOTT HUME

Like an unskilled videogame player reacting too slowly to the changing action on the screen, Pizza Time Theatre is facing the end of the game.

But while some observers are calling the company's rapid rise and fall a classic case of marketing misjudgment, the product Pizza Time pioneered may survive.

The idea of using technological innovations to combine entertainment and dining in one package still has its advocates. However, those who continue to refine the concept agree that Pizza Time's decline has taught them important lessons about defining and reaching their market.

Last week's announcement that the Sunnyvale, Cal.-based Pizza Time would report fourth-quarter losses from continuing operations of at least $16 million was only the latest bad news from the franchiser of restaurant/entertainment centers.

The fourth-quarter report follows losses of $6 million through the first nine months of fiscal 1983, and the company said it will take an additional $35 million writeoff from the earlier announced closing of 19 Chuck E. Cheese's Pizza Time Theatre stores.

Without help from creditors, including a break on rental obligations, company president Randall Pike said the company would be forced to file for protection under bankruptcy statutes.

A spokesman adds that Pizza Time has no firm plan to reverse its fiscal slide. Company executives, the spokesman said, haven't had time to figure one out "since right now we're up to our necks in alligators."

As one analyst predicts, "Chapter 11 will be the last chapter for them."

The unraveling of Pizza Time's fortunes comes less than three

(Continued on Page 78)

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Miller stands behind prior substantiation

By RICHARD L. GORDON

WASHINGTON—The big flap over the Federal Trade Commission's ad substantiation policy wound down last week with a proposed policy statement that scotches the prospect of major changes in the forseeable future.

While FTC chairman James Miller talks of additional long-range studies, he told an invited audience of ad industry leaders March 23 he is settling now for changes in three major areas, which do not go beyond clarifying and simplifying the core requirement that advertisers must have a reasonable basis for claims before making them.

His challenge to ad substantiation, reflecting his fears that it chills the freedom of advertisers to make claims, has created tension between his regime and ad industry leaders. The key points he now recommends reflect fine-tuning primarily in areas where the industry itself agreed that changes were needed.

First, they attempt to give advertisers more guidance on the quantity of substantiation they must possess to have a "reasonable basis" for their claims.

Where ads explicitly or implicity claim a particular level of support (such as when an ad says "a laboratory test proves"), the Miller policy would have the FTC declare that the advertiser's substantiation must meet the standard.

Where it's unclear what kind of support consumers would expect for a claim, judgments still would have to be made by the FTC on a case-by-case basis.

Second, they call for the FTC to declare that it sometimes will consider evidence developed *after* a claim is made, even though the ad substantiation policy states that an advertiser must possess a "reasonable basis" for its objective claims at the time they are made.

Mr. Miller said the FTC's existing method of treating "post-claim" evidence has benefited large advertisers and agencies with sophisticated Washington lawyers "who knew how things really worked." His answer is to have the FTC publicly list four circumstances where post-claim evidence might be acceptable in an investigation.

But there will be no relief through "post-claim" evidence for

(Continued on Page 77)

Part of belt-tightening move

Merrill Lynch slashes ads

By ROBERT RAISSMAN

Merrill Lynch & Co. will slash its estimated $25 million 1984 advertising budget by at least 16% and is said to be considering the layoff of 1,000 employes, both actions considered part of a companywide move to cut costs.

The advertising cut may be only the beginning, according to James W. Walsh Jr., vp-advertising, Merrill Lynch. He said the final determination on what percentage of the budget will be cut will depend on how expenditures can be trimmed without hurting the company's over-all marketing strategy.

"We are not only going to reduce the entire advertising budget, but we are going to try to assemble funds to introduce a whole new strategy," Mr. Walsh said.

He said the strategy could take the form of a new campaign for the brokerage company beginning in mid-September. Young & Rubicam is the agency, and Mr. Walsh said the agency "was safe."

Mr. Walsh said Merrill Lynch will maintain a "sizable but not huge" campaign to maintain its visibility. Contract spaces in such places as *Barron's* and the *Wall Street Journal* will not be dropped.

The company's corporate print campaign has been dropped.

"That campaign, which is quite new, may never see the light of day again," Mr. Walsh said. He added that Merrill Lynch had some "significant" tv commitments.

Speculation ran high last week that Merrill Lynch was planning to lay off about 1,000 employes, mostly clerical and administrative employes. A Merrill Lynch spokesman said the company was looking at its entire

(Continued on Page 76)

last minute news

$10 million Commodore account to Drossman

NEW YORK—Anametrics Services, marketing agency for Commodore International, has awarded the computer marketer's estimated $10 million print account to Drossman Lehmann Marino Reveley, New York. Steven Greenberg, president of Anametrics, said Drossman was selected because it is highly creative, has strong track records and "is flexible, which is essential in the computer industry." Tv creative earlier was given to Dick Rich Inc., with placement going to Clifford Botway Inc. (AA, Jan. 30). Ally & Gargano lost the account last summer.

Johnson & Johnson airs spot for toothpaste

NEW BRUNSWICK, N.J.—Johnson & Johnson has aired a commercial on a cable station in San Diego for Prevent fluoride toothpaste, said to prevent "hard crusty buildup [on teeth] by 50% once your dentist has cleaned your teeth." It was not known at press time if the product is being sold at retail or if the spot was a concept test. The agency also is not known.

Magic Pan names D'Arcy for $2 million account

SAN FRANCISCO—Magic Pan International named D'Arcy MacManus Masius here to succeed Benton & Bowles, Los Angeles, on its $2 million account.

(Continued on Page 8)

Kodak set to unfurl videotape

By GAY JERVEY

Eastman Kodak next week launches what is said to be a $15 million-to-$20 million campaign for its new line of blank tapes for videocassette recorders.

Kodak will begin marketing blank tapes in both the Beta and VHS formats (AA, Dec. 26).

The effort, which comes in time to steal some thunder from Polaroid's imminent videotape introduction, is expected to usher in a new wave of big spending in the $485 million videotape market, in the throes of its first price-cutting

(Continued on Page 76)

Fleet-size ad dispute

Avis asks court to brake Hertz

By ROBERT RAISSMAN

The battle between Avis and Hertz once again has moved from the highway to the courtroom with the "Trying harder" bunch claiming that new Hertz ads contain false statements.

In a lawsuit filed last week in federal court in Uniondale, N.Y., Avis charges that the claim in a new national Hertz print and radio campaign—that Hertz has "more new cars than Avis has cars"—is false and will cause Avis irreparable harm.

The print ads ran in *American Way*, American Airlines' in-flight magazine, and the March 12 *Wall Street Journal*. Radio spots making the same claim also have aired, according to the court papers. Scali, McCabe, Sloves is agency for Hertz.

"The case is without foundation," a Hertz spokesman said. "Hertz' claim is correct and we intend to prove it in court."

The print ads are headlined, "Hertz has more new cars than Avis has cars." A small subhead reads: "We're rolling out over 135,000 1984 cars." In the *Journal* ad, a footnote says Hertz' claim is "based on car registration and major airport statistics."

Avis is asking the court to stop Hertz from continuing the campaign. Avis also is seeking an order that would force Hertz to initiate "corrective advertisements" and award Avis damages for Hertz' "wrongful acts."

Avis also is seeking all profits that Hertz will receive or has received from using the ad.

Industry sources said Avis initiated the suit to discover how Hertz executives gained informa-

(Continued on Page 74)

The stage is set for Jane Fonda Workouts apparel—See Page 66.

Loss report cools off Ally stock

By MARK LIFF

NEW YORK—Ally & Gargano, in recent years one of the hottest ad agencies here, last week projected quarterly losses of about $200,000, a disclosure that caused the agency's stock price to plummet to its lowest level since it went public last December.

The loss for the quarter, which ends March 31, would be the agency's first since it began trading. A&G reported net income of $312,000 in the same period last year. In the fourth quarter of 1983, A&G reported income of $873,000, a 14.4% drop from 1982.

The agency attributed the latest loss to "an unanticipated curtailment of advertising expenditures for the last half of the fiscal year by three clients and the next by another client."

A&G refused to identify the clients, and none contacted by ADVERTISING AGE would comment.

Just a week ago, A&G said only two clients had curtailed advertising expenditures and another had transferred expenditures to the next fiscal year.

Amil Gargano, A&G's president-chief executive officer, said in a statement that the agency "expected to return to a substantial level of profitability during the fourth quarter of fiscal 1984." But he added, "net income for the full fiscal year. . .will be less than net income for fiscal 1983." The fiscal year ends June 30.

Wall Street analysts say it's impossible to tell just how low the price will tumble—or what it will mean to the company's future on the over-the-counter market.

"It [A&G] was never recommended by us," said Alan Gottesman, vp at L.F. Rothschild & Co. "We thought it was too risky. Why would you prefer Ally & Gargano to BBDO, which has a track record and substantial business experience?"

Mr. Gottesman said he didn't believe the company's current status was a result of its going public. "The company essentially is the same now as it was a year ago," he said. He was unable to explain the agency's plunging stock price—now 25% lower than when it opened.

On Thursday, the price of a share dropped half a point on trading of 500 shares. The bid was at 7½ and the asking price was 8.

Analysts said privately that they did not believe the company would revert to being privately held, as four

(Continued on Page 74)

Travis seen heading GOP effort

NEW YORK—Madison Avenue is buzzing with reports that the Ronald Reagan/George Bush 1984 re-election account will go to an ad hoc advertising group reportedly to be directed by James D. Travis, president-chief operating officer of Della Femina, Travisano & Partners.

Mr. Travis was known to be in Washington Friday reportedly to discuss funding and staffing of the powerhouse of creative talent for the re-election effort. He could not be reached for comment.

Despite reports Mr. Travis would direct an "all-star team" consisting of admen from across the nation, Reagan campaign officials claim no decision has been made and none is expected until this week.

Meanwhile, Rumrill-Hoyt, an agency that was reported to be in the running for the $25 million-to-$30 million account voluntarily dropped out of the competition last week.

"We didn't feel we could do justice to the President's campaign and provide the kind of service we like to provide to existing clients," said Gary Landis, president-chief executive officer. Rumrill had suggested a combination of a full-service agency and outside people to handle the account.

The Della Femina agency had been in line for the account, but subsequently withdrew. Jerry Della Femina, chairman, said at the time that he was unable to satisfactorily arrange agency compensation and allocation of his time.

The move by Mr. Della Femina to back out of the competition immediately prompted a scramble among ad agencies to secure the account.

John Buckley, assistant press secretary with the Reagan/Bush campaign, would not confirm the reports circulating through the industry that Mr. Travis would head the advertising effort.

"There is no decision yet, and there won't be any decision on any agency or people involved from agenices until sometime next week," he said in a telephone interview conducted last Friday from Washington.

Donald Sullivan, president of Ketchum

(Continued on Page 74)

highlights

Monday, March 26, 1984

Dailey & Associates will finalize its merger with SSC&B's Los Angeles office in June, a move likely to make the agency an even stronger force in the western U.S. *See Page 10.*

Following the resignation of Robert Mulholland as president-chief operating officer at NBC, Robert Walsh, a member of a new three-man team under chairman Grant Tinker, is seen eventually emerging as president. *See Page 14.*

After four years of preparation, the Chicago Evening Post Corp. remains a shell of an organization with many plans but apparently little money to back its launch of the *Chicago Post*. *See Page 30.*

Three commercials breaking today for Jane Fonda's new workout and sportswear line won't feature the actress, who has muscled her way into the workout world. *See Page 66.*

"Cagney & Lacey" and "Kate & Allie" opened big for CBS, but all three tv nets have been plagued with disappointing tryout series to fill some long-standing prime time problem spots. *See Page 77.*

CORPORATE CLOSEUP

Walt Disney Productions can't do something just to make money; it also has to continue to provide entertainment with some constructive ingredients—a precarious and dizzying balancing act. *See Page 4.*

INTERNATIONAL

Franco Maria Ricci, the Italian publisher, seems a bit eccentric even for Italy, but the Italian publishing world does not take him lightly. The U.S. is about to get its first taste of what makes him one of Italy's most successful publishers. *See Page 40.*

Kuwait-based Middle East Advertising Network Services has opened an office in Geneva in an attempt to snare more European business, especially in West Germany. *See Page 40.*

El Salvador's March 25 elections gave Salvadoran voters a taste of U.S.-style political marketing. *See Page 42.*

Thai tv viewers might get a bigger dose of commercials, thanks to the lifting of the country's ban on tv broadcasting between 6.30 p.m. and 8 p.m. to permit local stations to compete with communist programing spilling into Thailand from Laos. *See Page 44.*

VIDEOTECH

Thomas Kuhn, president of RCA Video Productions, a new division of RCA Records, believes that what's "absolutely crucial" to the division's success is the continued growth of videocassette recorder sales, and also a continued interest in music video. *See Page 48.*

MAGAZINE

Traditional companies are increasingly—and cautiously—targeting the gay market, a highly upscale and often trend-setting market segment. *See Page M-4.*

Special-Interest Magazines: Narrow in scope, great in number and bound by market-specific advertising, these periodicals reflect society's move to segment itself, and therein lies their mission. *See Page M-9.*

A letter from our correspondent in Bangkok describes a boom—and great improvement—in Thai advertising. *See Page M-56.*

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Isacsson exits CBS for Y&R

By GAY JERVEY

NEW YORK—Paul Isacsson has resigned as senior vp, Cable/CBG Enterprises, CBS/Broadcast Group, to become exec vp-director of network programing and purchasing at Young & Rubicam.

He succeeds Richard Low, who has left the agency by mutual agreement to start his own production and consulting company.

Both resignations are effective April 2.

Mr. Isacsson returns to Y&R, where he worked for several years during the 1960s. He had held his latest position at CBS since December, 1982, when he was promoted from vp-sales, CBS-TV Network, a title he held for the uncommonly long tenure of five years.

While head of network tv sales, Mr. Isacsson earned a reputation as being one of the most knowledgeable tv sales strategists and as a fierce and extremely skillful negotiator.

It was under Mr. Isacsson that CBS-TV unleashed its controversial policy to cease providing advertisers with guarantees for demographic audience deliveries in prime time. The decision to rescind the guarantees, considered by most

(Continued on Page 77)

After a fashion

Clairol Hairsetters is going after teens and working women in a new campaign from Foote, Cone & Belding that uses the before and after pictures, usually associated with fashion editorials, to underscore the themes of two ads: "More body and fullness look great in anyone's book" and "Look what more body and fullness can do for you."

CORP. I.D.
CORP. I.D.
Look what more body and fullness can do for you.
Clairol Hairsetters make it easy.
Hairsetting that's ready in minutes.
Clairol's Curl Holding Core.
Clairol Hairsetters.

Pillsbury's Milk Break hits cereal bar market

By JANET NEIMAN

Pillsbury will make its first, and probably not last, entry in the cereal-meal-bar category next month, when it begins marketing nationally Milk Break Milk Bars, a four-item line of chocolate-covered wafers with cream filling.

The product will be positioned in the healthy snack foods section of grocery stores along with granola bars and dried fruit rolls. But the new product will compete most directly with Quaker Oats Co.'s Granola Dipps chocolate-covered chewy granola bars, introduced this year (AA, Dec. 19).

Pillsbury is calling that supermarket aisle the "good-for-you" section, and it is placing Milk Break in that category because each bar contains "half a glass of milk."

The bars are flavored in chocolate, peanut butter, natural milk and chocolate mint.

The product will be packaged in cartons of six individually foil-wrapped bars. Each bar has three wafers separated by two layers of cream centers and chocolate coating. Milk Break was not test-marketed.

Pillsbury is backing the entry with what it calls its biggest introductory support ever. Advertising and promotion, handled by Ketchum Advertising, San Francisco, will reach $16 million.

Pillsbury's belated entry into the $350 million retail cereal-meal-bar category, which has grown 110% since 1980, is likely to be followed by other products. Rick Zaksas, marketing manager-new products in Pillsbury's consumer foods group, noted that Pillsbury considers Milk Break a major introduction, "an indication of our intent to establish a foothold in this category."

He would not comment on a potential granola product, but said it "would not be uncommon to look at second, third and fourth-generation" cereal-meal-bar lines.

Milk Break appears to fuel growth in the category segment

(Continued on Page 77)

P&G going into test with new liquid Tide

By TERESA H. BARKER

Trading off its longtime No. 1 brand in laundry detergent powders, Procter & Gamble has introduced a new liquid Tide in test market, and is expected to use heavy advertising and coupon promotions to woo consumers in the liquid-detergent market long dominated by Lever Bros.' Wisk.

In a liquid-product category estimated at about $700 million, Wisk claims about a 33% unit share, followed by P&G's Era Plus with 4.5% and Colgate-Palmolive's Dynamo with about 2.5%, industry sources say.

Wisk, which has enjoyed steady market share growth since its "Ring around the collar" campaign began in the early 1960s, recently surpassed P&G's Cheer granular detergent as the No. 2 detergent category-wide, with a market share of about 8% of the estimated $2.8 billion market.

Tide, the No. 1 seller, retains about a 22% market share in the over-all detergent category, but that claim is reported to reflect a decline of 3% since 1981.

New liquid Tide, an orange plastic container with the familiar Tide bull's-eye design, is being introduced in test markets in Florida, Iowa, Illinois and Indiana. The liquid is competitively priced, P&G said.

The liquid Tide package design features a built-in handle and a measuring-cup cap that is designed to drain unused detergent back into the bottle, P&G said.

Unlike P&G's concentrated Era Plus and its ¼-cup measure per load, liquid Tide is not a concentrate and uses a ½-cup per load.

P&G declined to discuss planned advertising except to say the account is handled by Compton Advertising, New York. The agency also has the powdered Tide, which accounted for more than $25 million in advertising in 1983. Retailers said they have been promised extensive tv advertising and coupon offers from April through August.

Industry observers say the new Tide product represents P&G's boldest move in a string of global efforts to establish a strong liquid-detergent product. P&G introduced Vizir liquid detergent overseas in 1981. It introduced Bonus liquid detergent in Japan.

In addition to Era Plus, P&G also sells Solo liquid detergent with fabric softener.

P&G said the new Tide is formulated differently from the granular Tide, but shares a "similar performance profile."#

world news roundup

Tokyo—Newsweek is negotiating with TBS Britannica, a Suntory Ltd. subsidiary, to publish a Japanese-language edition of the magazine by the end of the year to complement the English-language edition already available in Japan. *Newsweek* has a Japanese circulation of 48,000.

Rome—Federico Fellini, Italy's foremost movie director, has agreed to direct a commercial for Campari bitter soda. Mr. Fellini reportedly has been given creative carte blanche for the spot, his first ever.

Mexico City—Brandy Presidente, Mexico's best-selling liquor, has awarded its $5.4 million account to Publicidad Augusto Elias (AA, Feb. 27). Previous agency was Camacho Publicidad.

London—Boase Massimi Pollitt has been awarded the $4.5 million Robinson's Chesterfield disposable diaper account previously held by Dorland Advertising.

Melbourne—Consortium Advertising, Australia's 29th-largest agency last year, has gone into voluntary liquidation following account

(Continued on Page 40)

It's everywhere, it's everywhere

adWatch

By SCOTT HUME

How much attention has Wendy's "Where's the beef?" campaign received?

Forget the stories about the commercial last week in both *Newsweek* and *Time*. Forget that almost every political cartoonist has worked a drawing around the line. Forget that syndicated columnist Bob Greene wrote about Dancer Fitzgerald Sample copywriter Cliff Freeman. Forget the national discovery of director Joe Sedelmaier.

All that pales in comparison with a major newspaper such as the *Chicago Tribune* having its food section profile the food stylist who actually baked the big, fluffy buns used in the commercial.

When a commercial receives that kind of attention, it hardly seems necessary to say that Wendy's "Where's the beef?" is the best-remembered advertisement in the nation.

According to the February adWatch, Advertising Age's monthly survey of consumer advertising awareness, no other advertisement came close to Wendy's blockbuster. In fact, last month's awareness level for "Where's the beef?" was the highest registered since the survey was inaugurated in April, 1982.

Clara Peller and friends came to mind first for 90 of the 1,254 adults surveyed. That may not sound impressive, but dozens of ads are named in an average month. The Miller and Lite beer spots, which were the most frequently recalled advertising in January, were named by 33 respondents.

Last month's runner-up to Wendy's was Pepsi, which, like Wendy's, also had the distinction of being included in news programs after the injury to Michael Jackson during filming of the commercial. Pepsi was named by 40 respondents, and it probably would have been No. 1 in any other month.

All that attention also has brought "Where's the beef?" its share of criticism. John Kawula, vp at the

(Continued on Page 72)

Census study shows major agency growth

Washington—The first ad agency results from the U.S. Census Bureau's five-year census of service industries show a period of unparalleled growth, with receipts up 83.8% in 1982 over 1977.

While the receipts are not adjusted to reflect inflation, other information released from the census provides strong evidence that agencies have been building on a momentum that surfaced in the preceding census.

That census, covering 1977, had recorded a 73% increase in receipts, compared with increases of about 30% during each of the three preceding censuses.

Receipts are distinguished from billings and are defined as commissions on media, materials and services; pr and service fees, and other receipts.

Other impressive gains were recorded in employment, up 27.6%; annual payroll, up 78.5%, and the number of ad agencies, up 23.6%. Employment had been up 10.7% in the preceding census; payroll, 52.6%, and the number of agencies, 12.5%. The payroll and employment data represented dramatic changes from the 1972 census, which showed a fractional percentage point decline in employment, with payrolls up only 22.8%.

The results also indicated rising productivity. Payroll per employe was up only 39.9%, while receipts per employe showed a 44% gain.

Actual dollar receipts for 1982 were $5,822,664,000, compared with $3,168,560,000 in 1977. Agency annual payrolls totaled $2,618,668,000, up from

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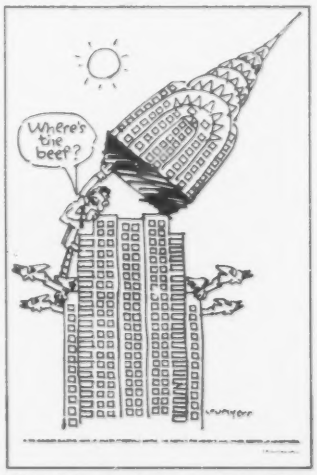


Wendy's agency, Dancer Fitzgerald Sample, claimed a stake in the "beef" fallout with an ad in the *New York Times* (above). Meanwhile, a Milwaukee fast-food chain, Suburpia, said the Wendy's commercial uncannily resembled its own (photos at right).

'Beef' goes abroad, but heats up at home

Dublin, O.—Walter Mondale's embrace of "Where's the beef?" as a campaign jibe at Gary Hart may hasten Wendy's use of the commercial overseas, just as another chain lays claim to the line's authorship.

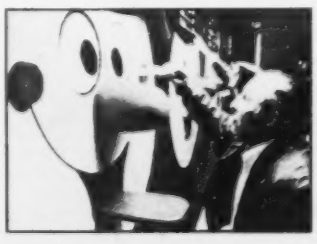
Extensive news coverage of the U.S. presidential race has introduced the line to foreign markets, although it has produced some confusion in at least one country.

William Welter, Wendy's exec vp-marketing, said the chain's Australian franchisee called the parent company here after hearing Mr. Mondale leading supporters in a "Where's the beef?" chant.

"He thought it had something to do with a controversy over Australian beef shortages," said Mr. Welter.

The line has caught on in Aus-

(Continued on Page 72)



Dorland, DFS create European net

By DENNIS CHASE

Dancer Fitzgerland Sample and Dorland Advertising set up a new agency network last week that will expand the Saatchi & Saatchi empire.

Dorland is owned 100% by Saatchi & Saatchi, which wants a second agency network to go with Saatchi & Saatchi Compton Worldwide and handle conflicting accounts (AA, Aug. 1).

The new agreement creates Dorland/DFS International, a pan-European consortium based in London.

Dorland appears to have gained control over Dancer's European operation, although details about equity positions in the new group will not be announced for about six months.

The new group will be run by Dorland board member Neil Kennedy, who becomes managing director, and will take over all the current clients of Dancer's struggling London agency, Michael Bungey & Partners/DFS Holdings.

That agency saw its gross income fall 21% last year, to $6.2 million.

By contrast, the combined billings of Dorland and Dorland/DFS are expected to reach more than $180 million, boosting Dorland from ninth to fourth in U.K. agency rankings.

Dorland/DFS also will take over all 14 of Dorland's owned, partially owned and affiliated agencies in Europe. It will change their names eventually to Dorland/DFS.

DFS' international network last year had total billings in Europe of $211.6 million, while Dorland has no agencies outside Britain.

"Dorland is gaining access to an established network with offices in place," admitted William Vickery, chairman of DFS International and now a member of the Dorland/DFS board. "If they bring business to those offices, it benefits both agencies."

Dorland has many clients, including Sheraton Hotels, Jaguar and British Airways group tours, that want to expand into new European markets.

DFS International clients also are expanding in Europe, including Wendy's International and General Mills' toys.

But expansion plans for Dorland/DFS go beyond Europe and encompass even the U.S.

"For our British clients in particular there will be a lot more activity in Europe than elsewhere in the world," said Jack Rubins, Dorland chairman-chief executive officer. "But eventually we hope to introduce them to the worldwide facility, including the U.S."

Both Mr. Vickery and Mr. Rubins deny any Saatchi & Saatchi involvement in the new agency. Mr. Rubins says his portion of the funding for the new venture came from sources outside the Saatchi agency, which "doesn't come into it, except that we kept them informed."

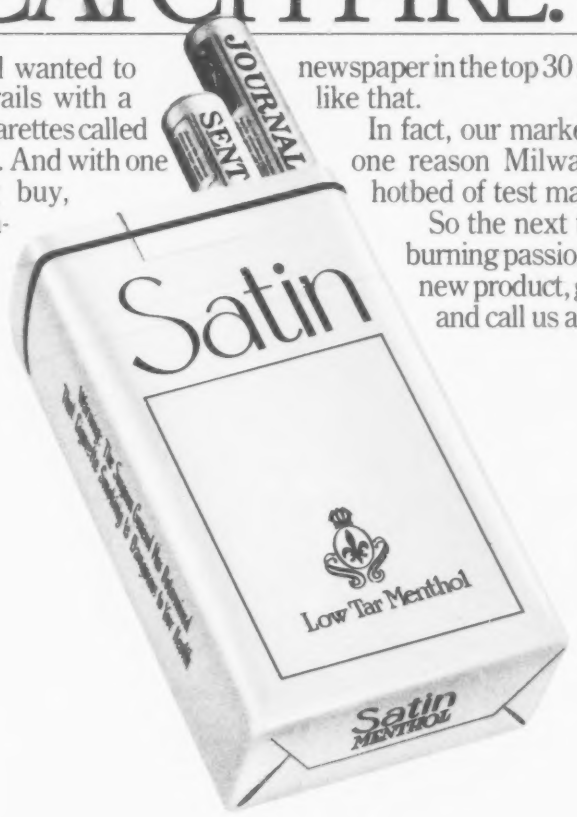
Previous talks between the two agencies fell through last year when DFS resisted Dorland's attempt to take over the U.S. agency, according to one source. Other sources said DFS' $200 million asking price was too high for Dorland (AA, July 25).#

WE HELPED SATIN CATCH FIRE.

When Lorillard wanted to blaze new trails with a hot new brand of cigarettes called Satin, they called us. And with one simple advertising buy, they kindled the interest of 76%* of the Milwaukee market every day. No other newspaper in the top 30 markets delivers like that.

In fact, our market penetration is one reason Milwaukee is such a hotbed of test marketing.

So the next time you have a burning passion to test market a new product, get on the hotline and call us at (414) 224-2472.



The Milwaukee Journal/Milwaukee Sentinel

The top combination in the top 30 markets.

Member Million Market Newspapers, Inc.
*Source: 1983 Scarborough National Newspaper Audience Study.

U.S. Agency Income issue due March 28

The 40th annual U.S. Agency Income issue will be published by Advertising Age as a special midweek issue March 28. It will contain individual profiles of 812 agencies, including 1983 gross income, billings and accounts won and lost.

The special issue also contains an extended profile of Ad Age's selection of Agency of the Year for 1983.#

Wolfe, Liff join 'AA'

Chicago—John Wolfe and Mark Liff have joined Advertising Age as assistant international editor and senior editor, respectively.

Mr. Wolfe, who reports to Dennis Chase, international editor, holds day-to-day operating responsibility for the international news department of AA, including editing, rewriting and production of the international section and editing of all other international coverage.

Working with the international correspondent network and with domestic news bureaus, he is responsible for generating story ideas, approving story proposals from reporters and making assignments.

He succeeds Carolyn Hulse, who earlier left the publication.

Mr. Wolfe formerly was with the Associated Press news bureau here, where he had been a general-assignment reporter, writer and editor since August, 1981.

Previously, he had been with the *Kansas City Times* serving as a metropolitan desk reporter (1979-80) in Kansas City and legislative and political reporter in Jefferson City, the Missouri capital (1980-81).

■ Mr. Liff will be based in the New York bureau. His duties include story-project direction and planning, editing and rewriting.

He'll work directly with John O'Connor, New York bureau chief, and Craig Reiss, New York news editor, in this newly created position.

Mr. Liff comes to AA after 10 years with the *New York Daily News*, where he has worked in a large number of reporting and editing areas. Most recently, he has been a reporter, writer, rewrite man and editor on the national/foreign news desk.

His previous *Daily News* experience includes stints as a general-assignment reporter, overnight editor, education writer, labor writer and transit writer.

Mr. Liff also will do spot news and news feature reporting and writing for AA. He has been contributing free-lance articles to the Magazine section of Advertising Age for more than a year.#

corrections & clarifications

- The totals given in the fast-food chain tv spending chart (AA, March 19, P. 1) were for the complete fast-food/restaurant category, not just for the top 15 chains listed.
- Robert McConaughey's title at *Dental Economics* is associate publisher (AA, March 12, P. 20).
- The agency for Hewlett-Packard's co-op sweepstakes campaign is Benard/Resnick & Co., San Francisco (AA, March 12, P. 8).
- The phone number for Pets Are Wonderful's ad competition is (312) 836-7145 (AA, March 12, P. 59).#